Virginia Information Technologies Agency

Commonwealth of Virginia

2005 Guidance

for

Agency IT Investment Planning

Issued

by the

Chief Information Officer of the Commonwealth

May 12, 2005

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The purpose of this document, '2005 Guidance for Agency IT Investment Planning', is to provide an overview of the Agency IT Strategic Planning (ITSP) process and specific instructions for 2005 plan submissions and is composed of the following Sections:

- Section I contains a statement of purpose and a description of the contents of the report.

- Section II provides background information including an overview of the Agency Strategic Planning Process and IT investment management.

- Section III of this document provides guidance on the IT Strategic Plan component of the Agency Strategic Plan.

- Supporting documentation contained in the Appendices is as follows:

  o Appendix A contains pertinent information regarding IT Strategic Planning from the Department of Planning and Budget's (DPB) Strategic Planning Guidance.

  o Appendix B contains a copy of '2005 IT Investment Board Project Selection and Ranking Criteria for Major IT Projects'.

  o Appendix C contains the Preliminary Business Case Questions for Major IT Projects as approved by the IT Investment Board.

  o Appendix D provides detailed instructions for entering the plan submission into CATSPA online application.

All agency planned IT investments will be submitted using the IT Strategic Plan amendment process in the online Commonwealth Agency Technology Strategic Plan Application (CATSPA). The data collection effort will be conducted in a two phased implementation with the following deliverables:

- Major IT project data to be completed by May 31st for the September 1, 2005 Recommended Technology Investment Projects (RTIP) Report.

- A draft IT Strategic Plan that includes major and non-major projects and procurements for the next budget biennium to be submitted by July 15th as part of the Agency Strategic Plan submission to DPB.

All major IT projects submitted and approved by Agency Heads as of May 31, 2005 will be considered by the IT Investment Board for priority ranking in the 2005 (RTIP) Report due to the Governor and General Assembly on September 1, 2005

The *Code of Virginia* requires all state agencies and public institutions of higher education to prepare and submit information technology plans to the Commonwealth Chief Information Officer (CIO) for review and approval. All state agencies and public institutions of higher education are to maintain current information technology plans that have been approved by the Commonwealth CIO. The Commonwealth CIO is required to "Direct the development of policies and procedures, in consultation with the Department of Planning and Budget, that are integrated into the Commonwealth's strategic planning and performance budgeting processes, and that state agencies and public institutions of higher education shall follow in developing information technology plans and technology-related budget requests."

The vehicle for collecting IT investment information for each agency in the Commonwealth Technology Portfolio is the Agency IT Strategic Plan. Information gathered during the IT strategic planning process is evaluated, scored, ranked, and collated into the Recommended Technology Investment Projects Report (RTIP) which is submitted to the Governor and General Assembly on September 1.

The RTIP Report is the vehicle for implementing IT Investment Management (ITIM) in the Commonwealth of Virginia. ITIM is an integrated approach to managing IT investments that provides for the continuous identification, selection, control, life-cycle management, and evaluation of IT investments. ITIM uses structured processes to minimize risks and maximize return on investments, and provides the foundation for the process used to produce the RTIP Report. The Commonwealth Technology Management Policy, which establishes ITIM processes for the Commonwealth, can be found at http://www.vita.virginia.gov/docs/ea/Technology_Management_Policy_Publication.pdf.

On April 25, 2005, the Department of Planning and Budget (DPB) issued guidance for developing the Agency Strategic Plan for the 2006-2008 Budget Biennium. In addition, a series of communiqués and requests have been issued from DPB regarding the development of a performance-based budgeting system which includes the development of an integrated strategic plan and the new "service area" budget process for the 2006-2008 Budget Biennium. Excerpts from the 'Agency Planning Handbook for Planning and Budgeting' issued by DPB regarding technology investments can be found in Appendix A.

The Agency IT Strategic Plan should comply with and will be evaluated against the following:

- The 'DPB Strategic Planning Guidance for the 2004-2006 Budget Biennium' issued in April 2005 (http://www.dpb.virginia.gov/SP/index.htm)

- The Governor's Issues and Initiatives (http://www.governor.virginia.gov/)

- The strategic initiatives outlined in 'A Refresh of the Commonwealth of Virginia Strategic Plan for Technology' (http://www.vita.virginia.gov/docs/pubs/StrategicPlanRefresh_2005_05-04-04.pdf)

- The 'Commonwealth Technology Management Policy' (http://www.vita.virginia.gov/projects/cpm/cpmDocs/tech2002.cfm)

- The Commonwealth Enterprise Architecture objectives, which can be found in the 'Common Requirements Vision' document located at (http://www.vita.virginia.gov/cots/ea/library/generalEAdocuments.cfm)

Agencies' IT Strategic Plans should reflect changes to business priorities and associated technology investments. ITSP investments can be categorized in one of the following groups:

- Major projects
- Non-major projects
- Major procurements
- Non-major procurements

All proposed or continuing projects, including telecommunications projects, with expenditures planned for the 2006-2008 Budget Biennium, regardless of funding source, should be identified in the Agency Strategic Plan. **Infrastructure projects, as well as procurements pertaining to assets or functions that have transitioned to VITA, whether in support of major/non-major projects or stand-alone procurements, will be identified in the 'VITA IT Strategic Plan'. VITA's Enterprise Service Directors (ESD) and the Service Level Directors (SLD) will work with each agency to ensure the infrastructure needs of each agency are incorporated into the 'VITA IT Strategic Plan'.**

Agencies IT Strategic Plan information will be collected in three submissions with completion dates established for each submission:

- Submission I of the plan focuses on major projects, with a completion date of May 31, 2005

- Submission II focuses on the completion of the IT Summary and Appendix A, which includes non-major projects and procurements, with a completion date of July 15,

2005. Institutions of higher education with decentralized procurement authority are exempt from submission of:

- o non-major projects
- o major procurements
- o non-major procurements

- Submission III of the plan focuses on associating all projects and procurements with service areas, business objectives, and key customers, with a completion date of September 20, 2005

In Fiscal Year 2006, agencies will be executing their current Agency Strategic Plan for the 2004-2006 budget biennium, as well as preparing a new Agency Strategic Plan for the 2006-2008 budget biennium. Therefore, agencies should be aware of the following points:

- Agencies will be developing and finalizing their 2006-2008 strategic plan per this guidance.

- The vehicle for maintaining both the 2004–2006 and 2006-2008 IT strategic plans is CATSPA. Accordingly, agencies will need to execute care when logging on to the system to insure that the appropriate plan is amended. CATSPA instructions are contained in Appendix D.

- Projects and procurements that will be initiated in the coming Fiscal Year 2006 must be entered into the current Agency IT Strategic Plan for the 2004-2006 Budget Biennium. If a project or procurement spans both budget biennium, both strategic plans must be updated

- Agency Head approval will be designated in CATSPA by clicking a certification button

Key Dates

Action	Date
DPB Issues 2005 Strategic Planning Guidance	April 25
VITA Issues 2005 IT Investment Guidance	May 12
Agency Input of Major IT Project Proposal Information into CATSPA	May 17 – May 31
Agency Input of Non-Major IT Projects and Procurements	June 1 – July 14
Agency Certifies Major IT Projects Information for RTIP 2005 in CATSPA	June 15
VITA Submits Draft RTIP 2005 to ITIB	July 8
Agency Certifies Agency IT Strategic Plan Information in CATSPA	July 15
Commonwealth CIO/IT Investment Board Approves RTIP 2005	August 10
Final RTIP 2005 Report to Governor and General Assembly	September 1
Agency Strategic Planning Updates in Support of Budget Decision Packages	September 20
Agency Strategic Planning Updates in Support of the Governor's Budget	January 2006
Agency Strategic Planning Updates to Align with the Finalized Budget	May 2006
DPB to Approve Agency Strategic Plans	June 2006
Commonwealth CIO to Approve IT Component of Agency Strategic Plans	June 2006

Plan Evaluation and Approval Criteria

Agency IT Strategic Plan

VITA's Project Management Division (PMD), on behalf of the Commonwealth CIO, will review each Agency's IT Strategic Plan for:

- Completeness

- Adherence to planning guidance

- Compatibility with the Commonwealth of Virginia Strategic Plan for Technology

- Compatibility with the Agency Strategic Plan

- Compatibility with Enterprise Architecture Standards

Based upon its review, PMD will provide an approval recommendation to the Proponent Secretary for comment. The approval recommendation will then be submitted to the Commonwealth CIO, who will approve or disapprove the Agency IT Strategic Plan. The approved Agency IT Strategic Plan will serve as a reference for PMD to validate agency technology investments, planned procurements, and project requests. Major project information (Submission I) will provide input into the Recommended Technology Investments Projects Report due to the Governor and General Assembly on September 1. A disapproved IT Strategic Plan may be modified by the agency and resubmitted. PMD will work with agencies to revise and resubmit plans that are disapproved by the Commonwealth CIO.

Project Evaluation Criteria - Major IT Projects

Agencies are asked to identify all planned Major IT Projects as part of the Agency IT Strategic Plan. A Major IT Project is defined in the Code of Virginia as: "… any state agency information technology project that (i) is mission-critical, (ii) has statewide application, or (iii) has a total estimated cost of more than $1 million." All Major IT Projects requiring any expenditure of funds during the 2006 – 2008 Budget Biennium must be identified in the Agency IT Strategic Plan, including "Active" projects in progress.

Evaluation and approval criteria for Major IT Projects as specified in the *Code of Virginia* include:

- Degree to which the project is consistent with the Commonwealth's overall strategic planning (as evidenced by the Strategic Plan for Technology, the Commonwealth Enterprise Architecture Enterprise Business Strategies, the Governor's Issues and Initiatives, and the Department of Planning and Budget agency strategic planning information for 2005). For further information on agency strategic plans, see the DPB Web site at http://www.dpb.virginia.gov/SP/index.htm

- Technical feasibility of the project

- Benefits to the Commonwealth of the project, including customer service improvements

- Risks associated with the project

- Continued funding requirements

- Past performance by the agency on other projects

Knowledge of evaluation criteria should assist agencies in the identification and selection of Major IT Projects for inclusion in the Agency IT Strategic Plans. Detailed information provided by each agency in subsequent project proposal submissions will be evaluated against these criteria. A copy of the '2005 IT Investment Board Project Selection and Ranking Criteria for Major IT Projects' is attached in Appendix B. Active projects will not be scored or ranked for the September 1 RTIP.

Non-major IT Projects

Agencies are asked to identify all planned Non-major IT Projects, including telecommunications projects, as part of the Agency IT Strategic Plan. Non-major IT Projects are those technology projects with an estimated total project cost of less than or equal to $1 million and not deemed mission critical or designated as having statewide application by the Commonwealth CIO. Non-major IT Projects with an estimated total cost of $100,000 or more require approval of the Commonwealth CIO. Non-major IT Projects will be evaluated against the same general criteria as Major IT Projects.

Procurements

According to the *Code of Virginia*, all technology procurements must be executed under procedures established by VITA. Agencies are asked to identify all planned procurements with an estimated cost of $50,000 and more, including telecommunications procurements, as part of the Agency IT Strategic Plan. The plan should include:

- All planned procurements supporting Major or Non-major IT Projects

- Major IT Procurements not supporting projects, with an estimated cost equal to or greater than $1 million

- Non-major IT Procurements not supporting projects, with an estimated cost of $50,000 and over but less than $1 million

All technology procurements with an estimated cost of $50,000 and over will be evaluated to determine if they are:

- Consistent with the Commonwealth and Agency Strategic Plans

- Adhere to the Commonwealth Enterprise Architecture

Procurements supporting Major or Non-major IT Projects will be approved as part of the project approval process.

ITSP Assistance

The Commonwealth Agency Technology Strategic Planning Application (CATSPA) is now being supported under the VITA Customer Care Center (VCCC). CATSPA support will only be provided during business hours, but the VCCC is open 24/7/365 to document support requests. Submit all questions, business and technical, to the VCCC by calling 1-866-637-8482.

Excerpts from the "Agency Planning Handbook for Planning & Budget" Issued By DPB Regarding Information Technology

AGENCY STRATEGIC PLAN

MISSION:

VISION:

VALUES: (Optional)

EXECUTIVE PROGRE

Current Service Pe
Productivity
Major Initiatives & F
Virginia Ranking &
Customer Trends &
Future Direction, Ex
Impediments

BACKGROUND INFOR

Statutory Authority

Customers:

Customer Base

Anticipated Ch

Information Technology Summary:

This section provides a view of the agency's information technology (IT) investments at an enterprise level. It is organized into four sections: Current State/Issues, Factors Impacting Information Technology, Anticipated Changes/Desired State of the agency's IT investment portfolio, and Agency IT Investments. The information provided within these sections provides an opportunity for the agency to identify its internally-driven and externally-driven IT challenges, to identify solutions that, when implemented, will achieve the agency's desired future IT state, and to provide a summary of the financial investment required to implement its IT strategies. Appendix A of the agency strategic plan lists all planned IT investments, i.e. new IT initiatives, active IT initiatives for which funding is allocated or needed during the next biennium, and the required financial investment associated with the initiatives. In the appendix, IT investments are identified as projects or procurements and are aligned with the service areas they support.

Current State/Issues

This section documents the challenges and issues the agency is facing at an enterprise or service area level. These issues are predominately internal in nature.

Examples:

❐ *The service area currently has a number of aging IT solutions that no longer meet the requirements of the business. Agency-critical applications reside on technology platforms that are outdated and increasingly hard to support from a hardware, software, and human resource perspective.*

❐ *Agency applications are not integrated and have created a situation where productivity is being lost due to duplicate data entry. In addition, data storage costs continue to increase as individual databases continue to grow and replicate a large percentage of the same data.*

Factors Impacting Information Technology

Factors impacting information technology are factors, requirements, or mandates that predominately come from external sources (e.g., increased demand from external entities, changes in the customer base, and changes in products and services provided).

Examples:

❐ *Local government is placing demands and pressure on the state to increase the productivity of local government workers by implementing integrated, automated systems solutions that promote data sharing between local and state offices.*

❐ *The eligible population for services has steadily increased over the last five years as a result of economic stagnation in sectors of the Commonwealth.*

❐ *Increased demands for compliance to HIPAA and Homeland Security will necessitate a review and update of security and data encryption.*

Anticipated Changes/Desired State:

This section lists the solutions that will address the issues and factors previously identified.

Examples:

❐ *The long-term solution will be for the agency to implement one fully integrated information technology solution.*

❐ *Short term, the agency will develop and implement a single user sign-on that will cross all current applications and assist with the issue of productivity.*

☐ *Short term, the agency will develop and implement a master client ID across all major existing databases to assist with the issues of productivity, integration, and connectivity.*

Agency IT Investments:

Category	Cost - Year One		Cost - Year Two		Total Cost
	General Fund	*Nongeneral Fund*	*General Fund*	*Nongeneral Fund*	
Major IT Projects					
Non-Major IT Projects					
Major IT Procurements					
Non-Major IT Procurements					
Totals					

Please refer to Appendix A for a more detailed view of information technology investments, aligned with service areas.

Appendices:

Appendix A: Information Technology Investments

This detailed view of information technology investments identifies the alignment of individual IT investments to agency service area objectives, and provides additional information for each investment (i.e., costs, start and end dates, service area owner, status of investment initiative as proposed or continuing). Each investment is also classified into one of the following categories, as defined in the *Code of Virginia* and the Commonwealth Technology Management Glossary:

- IT Projects (Major and Non-Major)
- IT Procurements (Standalone and Project-Related; Major and Non-Major)

This section of the Agency's Strategic Plan is to be developed in accordance with the guidance below.

The Commonwealth will be implementing an application to capture required strategic and service planning information and to integrate information captured in the Commonwealth Agency Technology Strategic Planning Application (CATSPA). Additional functionality will also be implemented within CATSPA to allow agencies to submit required Appendix A information.

Following are the investment categories as defined in the *Code of Virginia* and the Commonwealth Technology Management Glossary.

- IT Projects (Major and Non-Major)

    A project is a temporary endeavor undertaken to deliver a unique product or service.

    Major IT Project - In the Commonwealth of Virginia, a major IT Project is any state agency information technology project that: (i) is mission critical, (ii) has statewide application, or (iii) has a total estimated cost of more than $1 million.

    Non-Major IT Project - In the Commonwealth of Virginia, non-major IT Projects are those technology projects with an estimated total project cost of less than $1 million and not deemed to be mission critical or designated by the Chief Information Officer as having statewide application.

- IT Procurements (Standalone and Project-Related; Major and Non-Major)

A procurement is used to obtain goods or services and includes all activities from the planning steps, preparation and processing of a requisition, through receipt and acceptance of delivery and processing of a final invoice for payment. There are two types of information technology procurements, standalone procurements and project-related procurements.

Standalone Procurements – These procurements are used to obtain goods or services, not associated with a project, and include all activities from the planning steps, preparation and processing of a requisition, through receipt and acceptance of delivery and processing of a final invoice for payment. Examples: a procurement to renew an existing software license; a procurement to retain contracting services to augment existing staff; or, a procurement to buy 10 personal computers.

Project Related Procurements – These procurements are those that must be executed in order to complete a project. For example, if it is necessary to procure an application, hardware, or services to complete a project, the procurement cost would be included in the total project cost and would not be reported separately.

Both standalone and project-related procurements can be further classified as major or non-major.

Non-Major IT Procurements – Cost falls between $50,000 and $1 million.

Major IT Procurements – Cost is equal to or greater than $1 million.

A major IT project can have major and/or non-major IT procurements. However, a non-major IT project can only have non-major IT procurements.

Example of Appendix A (breakdown of IT projects and procurements):

Major IT Projects

The following example is a project that extends beyond the next biennium. Therefore, the estimated costs for the first and second year of the biennium do not equate to the estimated total cost. The project also has an associated procurement.

PROJECT NAME: *Integrated Business Support System (IBSS)*
DESCRIPTION: *The IBSS is a single solution and data repository that will support the majority of service area activities within the organization.*

Is this a proposed project or the continuation of an active project? (Proposed or Continuing)				Proposed
Planned project start date:	7/1/2006	Planned project end date:		7/1/2009
Estimated Costs:	Total	General Fund	Nongeneral Fund	Nongeneral Fund Type
Project cost (estimate at completion):	$5,250,000	$2,250,000	$3,000,000	
Estimated project expenditures first year of biennium:	$1,150,000	$1,000,000	$150,000	Federal
Estimated project expenditures second year of biennium:	$3,350,000	$1,000,000	$2,350,000	Other
Funding Required:	Total	General Fund	Nongeneral Fund	Nongeneral Fund Type
Funding required for first year of biennium:	$1,000,000	$1,000,000	$0	
Funding required for second year of biennium:	$1,000,000	$1,000,000	$0	

Service Areas served by this project:	Project Owner:	Objectives supported:	Customers Served
Child Welfare Services	Y	1,3,5	Children and their families Custodial parents/children
Customer Services	N	2	Local departments of Social Services
Payment Processing	N	4	Custodial parents/children

Procurements associated with this project:

Note: Identify below procurements that are related to the above project. The cost of these procurements, even though identified below, should also be included in the cost estimates above.

Procurement Description:	Microsoft Middleware		
Planned delivery date:	9/1/2006	Procurement cost (estimate at completion):	$750,000

Non-Major IT Projects

The following example is a project that has allocated funds and will be completed in the next biennium. Therefore, the estimated costs for the first and second year of the biennium do equate to the estimated total cost. The project also has an associated procurement.

PROJECT NAME: *Single User Sign-on (SUS)*

DESCRIPTION: *The SUS will provide the user community a single access point to all automated solutions negating the need for multiple user IDs and passwords.*

Is this a proposed project or a continuation of an existing project? (Proposed or Continuing)				Continuing
Planned project start date:	7/1/2005	Planned project end date:		3/31/2007

Estimated Costs:	Total	General Fund	Nongeneral Fund	Nongeneral Fund Type
Project cost (estimate at completion):	$750,000	$750,000	$0	
Estimated project expenditures first year of biennium:	$750,000	$750,000	$0	
Estimated project expenditures second year of biennium:	$0	$0	$0	

Funding Required:	Total	General Fund	Nongeneral Fund	Nongeneral Fund Type
Funding required for first year of biennium:	$0	$0	$0	
Funding required for second year of biennium:	$0	$0	$0	

Service Areas served by this project:	Project Owner:	Objectives supported:	Customers Served
Administrative and Support Services	Y	1,2	Agency Staff and Local Case Workers
Customer Services	N	2	Local departments of Social Services

Procurements associated with this project:

Note: Identify below procurements that are related to the above project. The cost of these procurements, even though identified, below should also be included in the cost estimates above.

Procurement Description:	ABS Software		
Planned delivery date:	7/1/2006	Procurement cost (estimate at completion):	$350,000

(i) *Standalone Major IT Procurements*

Procurement Description:	Maintenance of AMS Case Management System		
Planned delivery date:	7/1/2006	Procurement cost (estimate at completion):	$1,350,000

Service Areas served by this procurement:	*Procure-ment Owner:*	*Objectives supported:*	*Customers Served*
Customer Services	*Y*	*2*	Children in foster care

Standalone Non-Major IT Procurements

Procurement Description:	*Purchase 40 additional licenses of XYZ software*		
Planned delivery date:	9/1/2006	Procurement cost (estimate at completion):	$150,000

Service Areas served by this procurement:	*Procure-ment Owner:*	*Objectives supported:*	*Customers Served*
Administrative Services	*Y*	*4*	Case workers

2005 IT Investment Board Project Selection and Ranking Criteria for Major IT Projects

Criteria	Pts.	Score	***Weighted Score Factor	Tie Breakers Priority
1. Strategic Alignment				
Does the project support Commonwealth Strategic Plan for Technology initiatives?	5	5 pts. if the project supports at least one strategic initiative	Agency score times 2	4
Does the project support Commonwealth Enterprise Architecture (Enterprise) Business Strategies?	8	2 pts. for each Enterprise Business Strategy the project supports	Agency score times 2	5
Is this project mission critical to the agency?	4	Yes – 4 pts. No – 0 pts.		
What priority has the agency given to this project?	4	High –4 Medium –2 Low -0		
Does this project support one of the Governor's initiatives?	5	Yes – 6 pts. No – 0 pts.		
Does the project support the Agency Strategic Direction?	4	4 pts. if the project supports at least one objective or at least one service	Agency score times 2	
Maximum Pts.	**30**		**46**	
2. Technical Feasibility				
Is a proposed technical approach stated?	3	Yes – 3 pts. No – 0 pts.		
Is the proposed approach based upon proven technology?	2	Yes – 2 pts. No – 0 pts.		
Maximum Pts.	**5**		**5**	
3. Benefits to the Commonwealth				
Does the project benefit chronically underserved stakeholders?	3	Yes, > 1 stakeholder – 3ps. Yes, 1 stakeholder – 2 pts. No – 0 pts.	Agency score times 4	
Will the project increase public protection, health, education, environment, or safety, improve customer service, or increase citizen access to	5	Yes, > 1 priority – 5 pts. Yes, 1 priority – 3 pts. No – 0 pts.	Agency score times 4	

Criteria	Pts.	Score	***Weighted Score Factor	Tie Breakers Priority
services?				
Will the project transform the way the agency does business?	5	Yes – 5 pts. No – 0 pts.	Agency score times 4	3
Does this project have the potential to benefit other agencies within the Secretariat, other agencies outside the Secretariat, all agencies, or local governments?	10	Yes, benefits all 4 groups – 10 pts. Yes, benefits 3 groups – 8 pts. Yes, benefits 2 groups – 6 pts. Yes, benefits 1 group – 4 pts. No – 0 pts.	Agency score times 4	1
Does the project support legal or regulatory requirements?	7	Yes – 7 pts. No – 0 pts.	Agency score times 4	2
Maximum Pts.	**30**		**120**	
4. Risk				
What is the project cost risk?	5	Under $5m –5 pts. From $5-10m – 3 pts. From $10-20m –2 pts. Greater than 20m – 1 pt.	Agency score times 2	
What is the project complexity risk?	2	Low – 2 pts. Medium – 1 pt. High – 0 pts.	Agency score times 2	
What is the project risk assessment?	2	Low – 2 pts. Medium – 1 pt. High – 0 pts.	Agency score times 2	6
Does the project have a clearly defined business owner?	2	Yes – 2 pts. No – 0 pts.		
Does the project have a clearly defined project sponsor?	2	Yes – 2 pts. No – 0 pts.		
Does the project have a clearly defined scope?	2	Yes – 2 pts. No – 0 pts.		
Maximum Pts.	**15**		**24**	
5.Funding Requirements				
What is the confidence level in the accuracy of the initial project estimated cost at completion?	2	Low – 0 pt. Medium – 1 pt. High – 2 pts.		
Did the agency describe a valid method to determine the estimate cost at completion?	2	Yes – 2 pts. No – 0 pts.		
Have tangible types of benefits been identified?	4	Yes – 4 pts. No – 0 pts.		
Have intangible types of benefits been identified?	2	Yes – 2 pts. No – 0 pts.		

Criteria	Pts.	Score	***Weighted Score Factor	Tie Breakers Priority
What percent of the project funding is from Non-state funds?	3	80 - 100% Non-state Funded – 3 pts. 50 – 79% Non-state Funded – 2 pts. 1 – 49% Non-state Funded – 1 pt.		
What is the project funding risk?	2	Low – 2 pts. Medium – 1 pts. High – 0 pts.		
Maximum Pts.	**15**		**15**	
6. Past Performance by Agency				
What is the overall rating average of all projects listed on the Dashboard for the agency?	3	If lowest overall rating average for any three consecutive months in the last year is: Green - 3 pts. Yellow - 1 pt. Red - 0 pts.		
If the project is listed on the Dashboard, what is the overall rating for the last three months reported?	2	If overall project rating for the last three months reported is Green - 3 pts. Yellow - 1 pt. Red - 0 pts.		
Maximum Pts.	**5**		**5**	
Total Pts. Possible for base score	**100**	**Maximum weighted score =**	**215**	

TIE BREAKER PROCESS – When 2 or more projects have the same initial weighted score, use the project assigned pts. for those criteria with assigned "Tie Breaker Priority" numbers in priority order.

Evaluate one priority criteria at a time for all tied projects:

- ❑ 1 point will be added to the weighted score of the project(s) with the highest score

- ❑ After evaluating priority criteria, if more than one project is still tied with the same weighted score proceed to the next priority criteria and repeat the process until the tie is broken.

Note: The tiebreaker process only used to determine PMD priority among those projects with the same initial weighted scores.

II. WEIGHTED CATEGORIES

***Weighted Score Factor: Based on last year's priorities as set by the ITIB.**

The most heavily weighted category is the 'Benefits to the Commonwealth' category with a factor of 4. This increases the maximum point's score to 100. This category was selected because it most closely aligns with the ITIB's decision to evaluate major projects from a customer "outcomes" focus.

 The second weighted category that supports this ITIB decision is the 'Strategic Alignment' category. This was weighted with a factor of 2 which increases the weighted score factor to 50.

The third weighted category selected is 'Project Risk'. This was weighted with a factor of 2, which increases the possible maximum weighted score to 32. This adds emphasis to the successful implementation and outcomes of the project.

Preliminary Business Case Questions for Major IT Projects

1. Will the project solve a business need identified in your current Agency Strategic Plan?

| No | ▼ |

2. Define the scope of the project:

Scope - The sum of the products and services to be provided as a project.

3. Is this project mission critical?

| No | ▼ |

If "Yes", explain why:
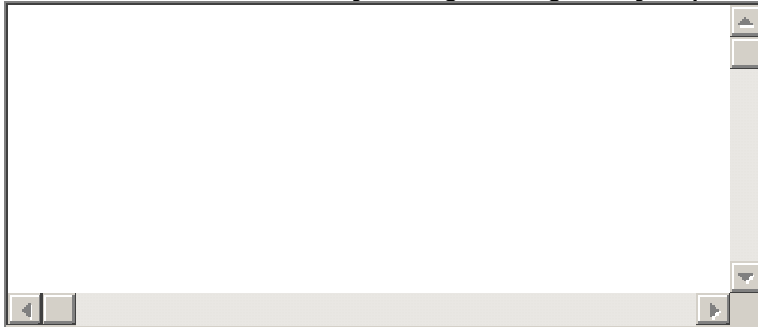
4. Is this project mandatory?

No ▼
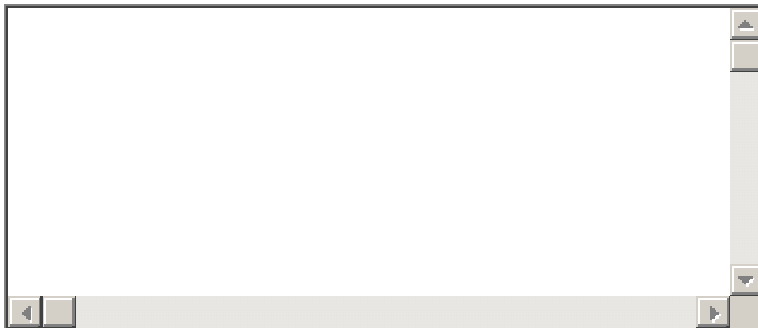
If "Yes", check all that apply:

☐ Federal Mandate

☐ State Mandate

☐ Other
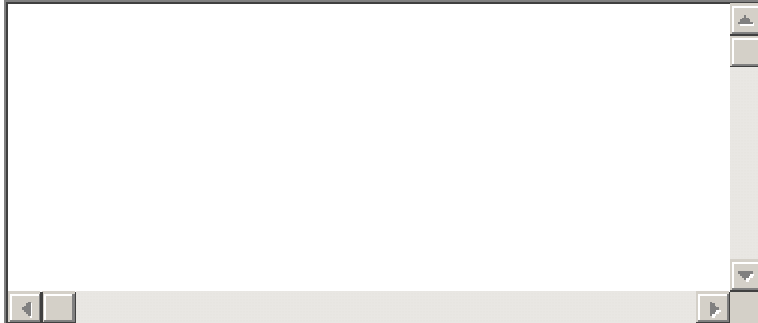
If "Federal Mandate", identify the legal or regulatory requirements, including federal code citations:

[text box]

If "State Mandate", identify the legal or regulatory requirements, including Code of Virginia citations:
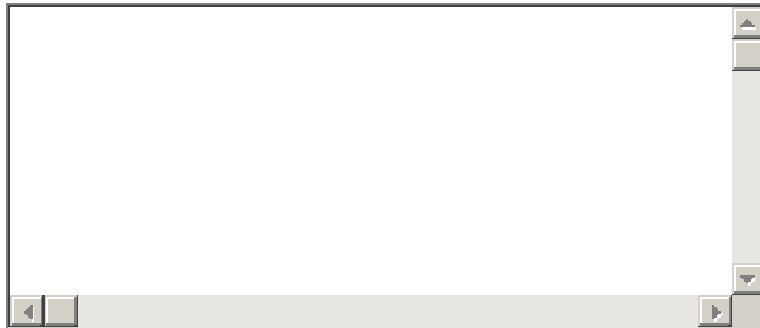
[text box]

If "Other", describe legal or regulatory requirements to include the source:

[text box]

5. Define the specific business objectives of the project: (Project performance measures will be developed from these project business objects.)

Project business objective - A desired result produced by a project that answers or resolves a business problem.
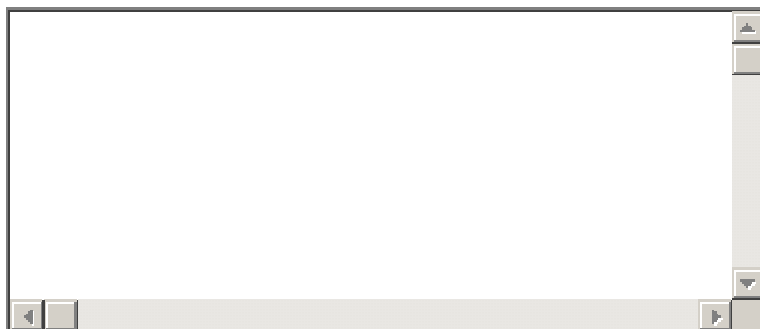
[text box]

6. Has the business owner(s) been identified?

Business owner - The primary functional stakeholder whose responsibilities are to identify and communicate business needs and knowledge for the project, and ensure the business needs are appropriately addressed by the project.

Yes ▼

If "Yes", list title(s) and name(s):
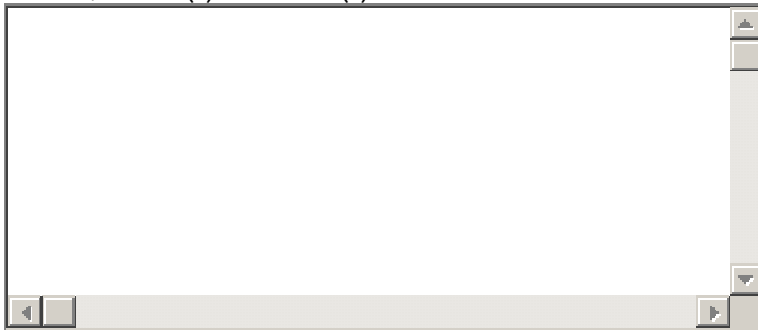
[text box]

7. Has the project sponsor(s) been identified?

Project sponsor - An individual, usually part of the organization management team, who makes the business case for the project. This individual usually has the authority to define project goals, secure resources and resolve organizational and priority conflicts.

Yes ▼

If "Yes", list title(s) and name(s):

```
[                                          ▲]
[                                          █]
[                                          █]
[                                          █]
[                                          █]
[                                          █]
[                                          ▼]
[◄  █                                   ►  ]
```
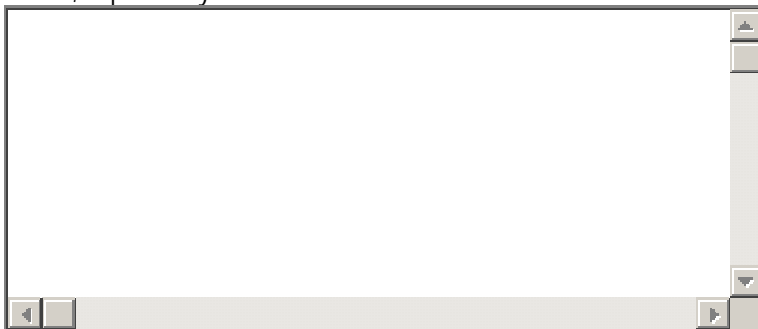
8. Does this project benefit or have the potential to benefit one or more of the following? Check all that apply.

☐   Other Agencies within your Secretariat

☐   Other Agencies outside your Secretariat

☐   All Agencies

☐   Local Governments

If this project can be delivered or provided by another existing citizen service delivery system among commonwealth agencies, would you be willing to use that service?

[Yes   ▼]
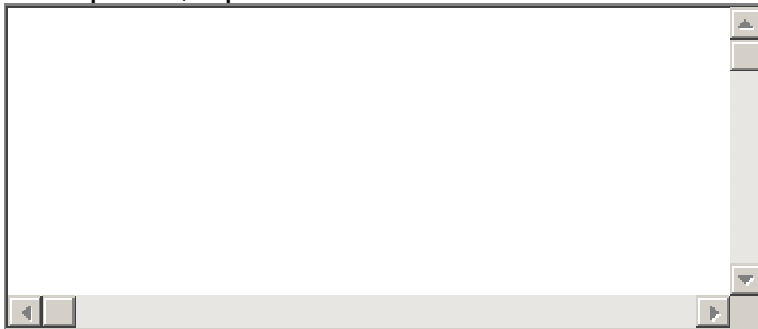
If "No", explain why:

```
[                                          ▲]
[                                          █]
[                                          █]
[                                          █]
[                                          █]
[                                          █]
[                                          ▼]
[◄  █                                   ►  ]
```

9. Which Governor's Issues and Initiative does this project support? Check all that apply.

- ☐ Virginia Works
- ☐ Healthy Virginians
- ☐ Virginia Excels
- ☐ Commonwealth of Opportunity Tax Reform Plan
- ☐ Education for a Lifetime
- ☐ 2003 Reform Agenda
- ☐ Virginia Corps
- ☐ Secure Virginia
- ☐ Partnership for Achieving Successful Schools (PASS)
- ☐ Commission on Efficiency and Effectiveness
- ☐ Economic Strike Force
- ☐ FAMIS Children's Health Insurance

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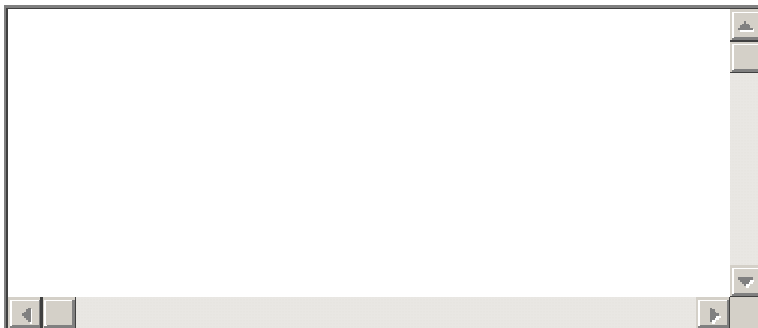
10. If this project supports the Enterprise Business Strategy "Support Virginia's Economic Development", explain how:

---

11. Are those who will benefit from this project currently underserved by technology?

No

If "Yes", list beneficiaries: *(organizations and stakeholders).*

---
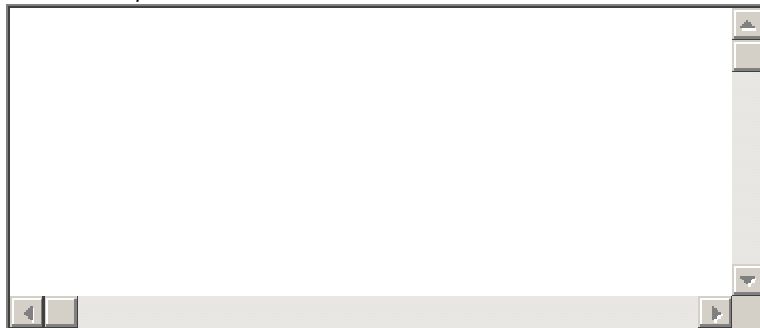
12. Will this project increase or improve any of the following priorities? *Check all that apply.*

- ☐ Public Protection
- ☐ Health
- ☐ Education
- ☐ Environment
- ☐ Safety
- ☐ Customer Service
- ☐ Citizen Access to Services
- ☐ Other
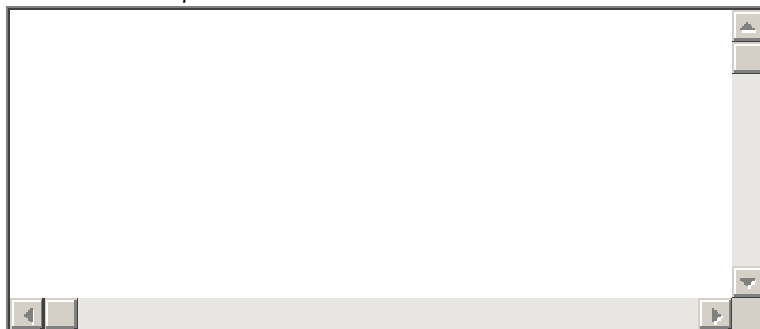
If "Public Protection", describe how:
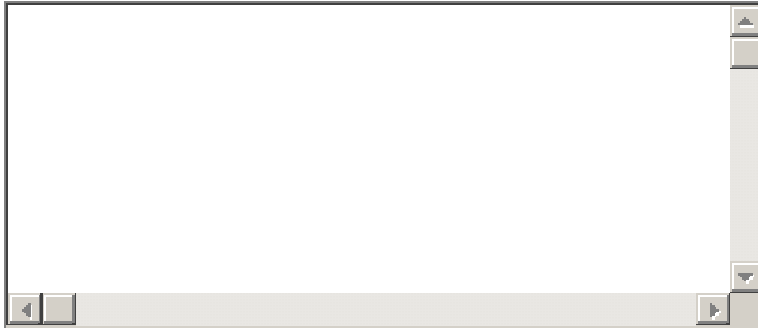
[text box]

If "Health", describe how:

[text box]

If "Education", describe how:
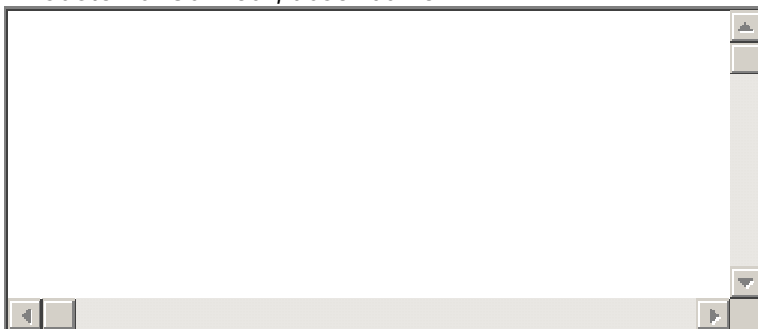
[text box]

If "Environment", describe how:

[text input box]
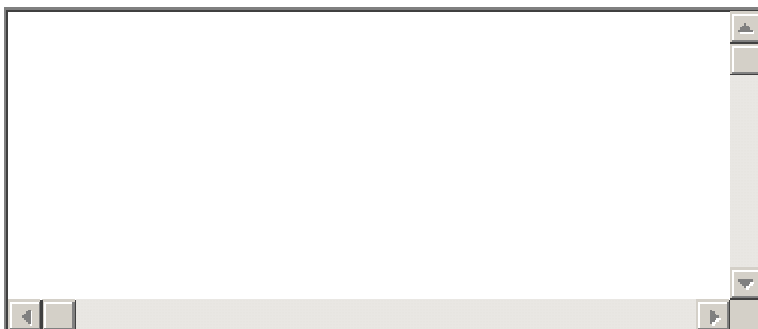
If "Safety", describe how:

[text input box]
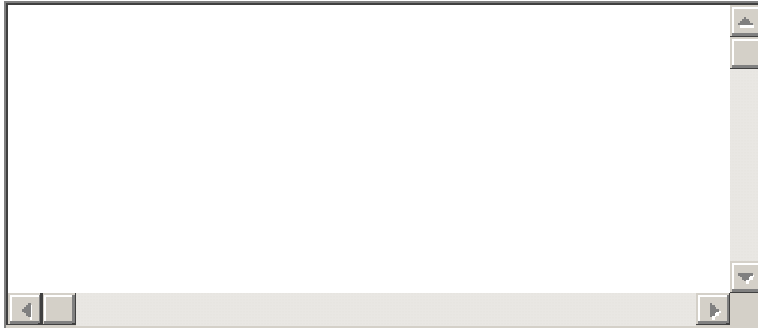
If "Customer Service", describe how:

[text input box]
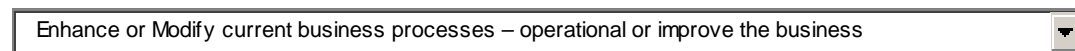
If "Citizen Access to Services", describe how:
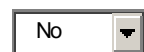
[text input box]

If "Other", describe how:

```
[                                          ]
```

---
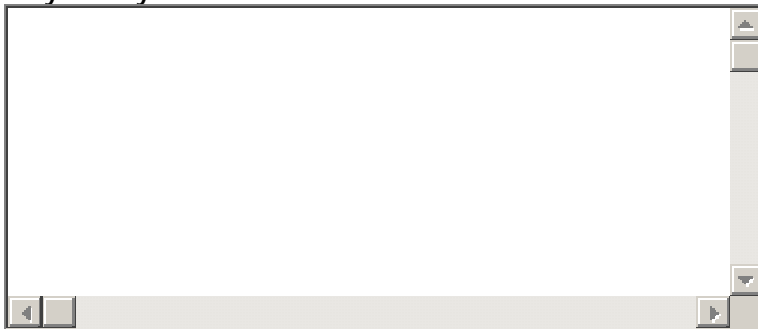
13. How will this project affect the way you do business?

```
Enhance or Modify current business processes – operational or improve the business   [▼]
```

If "transform the business", does your agency plan to conduct a Business Process Re-Engineering (BPR) study first?

```
No   [▼]
```

Why or why not?

```
[                                          ]
```
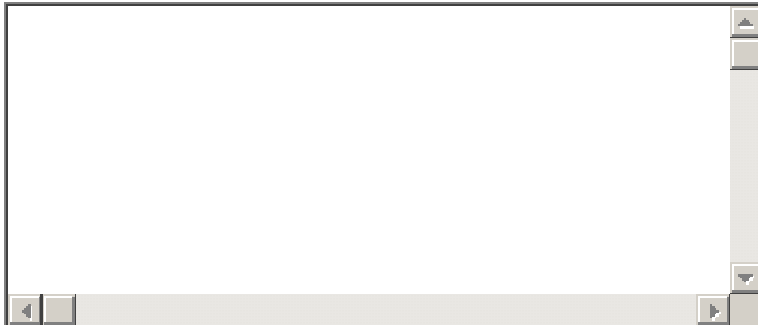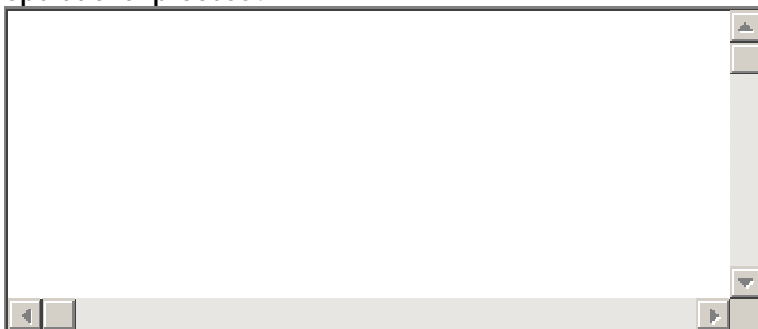
If your agency is planning a BPR study, identify the approach:

☐   Organizational Restructuring - Includes but is not limited to, reducing organizational layers, realigning functions or work groups, and/or driving accountability to the source.

☐   Work Redesigning - Includes but is not limited to expanding job scope and ownership, evaluating value added tasks, and establishing cross-functional relationships.

☐   Technology Retooling - Includes but is not limited to expediting access to information and gathering and communicating data.
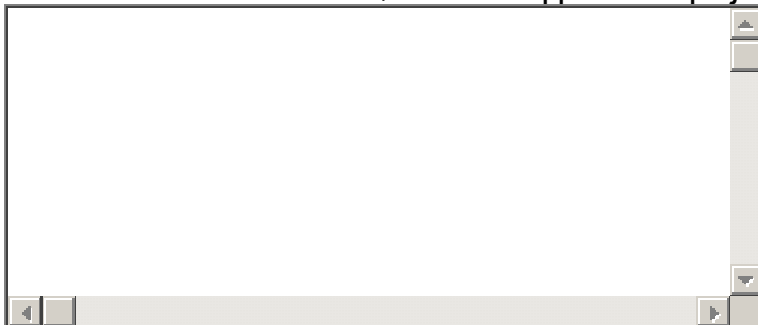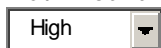
☐   Other

If "Other", describe the approach:

[text box   ]

If "operational or improve the business", how will this project modify or enhance an existing operational process?
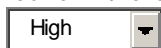
[text box   ]

If "maintain current business", what will happen if this project is not implemented?

[text box   ]

14. How would you rate the project's complexity? *(Use the Project Complexity Matrix found in the Commonwealth Project Management Standard.)*

[High ▼]

15. What is your preliminary risk assessment for this project? *(Use the Risk Assessment Matrix found in the Commonwealth Project Management Guideline.)*
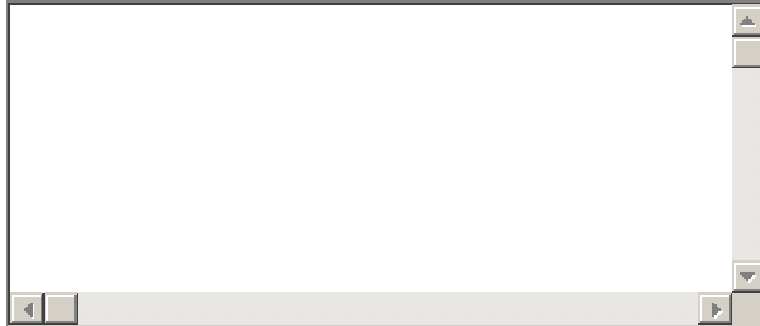
[High ▼]

Which component of this project is considered to be the highest risk?

Complexity ▾

---

16. What is your confidence level in the accuracy of the initial project estimated cost at completion? *(An explanation of High/Medium/Low can be found in IT Investment Planning Guidance.)*

Low ▾

Describe the method used to determine the estimated cost at completion.

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17. Will Tangible Benefits result from the project?

Tangible Benefits - *Benefits that can be measured and quantified. They include savings that result from improved performance and efficiency.*

No ▾
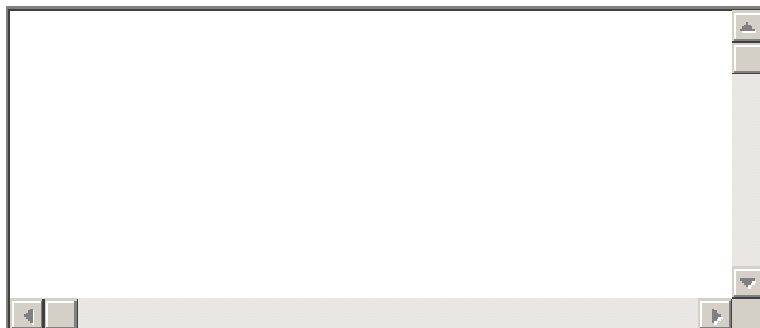
If "Yes", what type of tangible benefits do you expect? *Check all that apply.*

☐ Cost Savings

☐ Cost Avoidance

☐ Additional Revenue

☐ Other

If "Cost Savings", enter amount:

If "Cost Savings", enter description:

If "Cost Avoidance", enter amount:

[   ]

If "Cost Avoidance", enter description:

[text area]
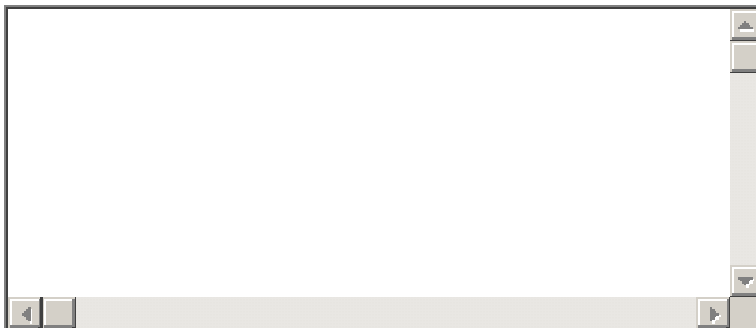
If "Additional Revenue", enter amount:

[   ]

If "Additional Revenue", enter description:

[text area]

If "Other", enter amount:

[   ]

If "Other", enter description:

[text area]

18. Will Intangible Benefits result from the project?
Intangible Benefits - Benefits that are difficult to measure and quantify. They include, but are not limited to customer retention, employee retention and improved customer service.
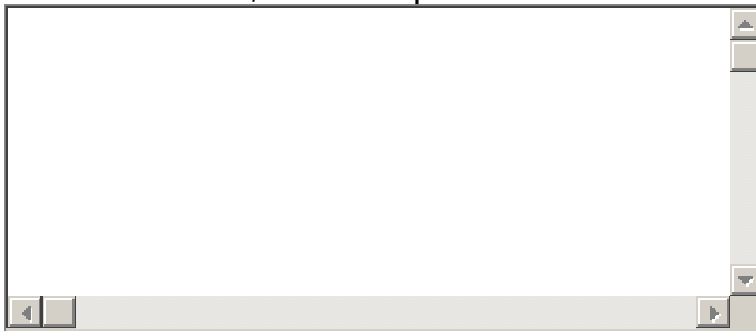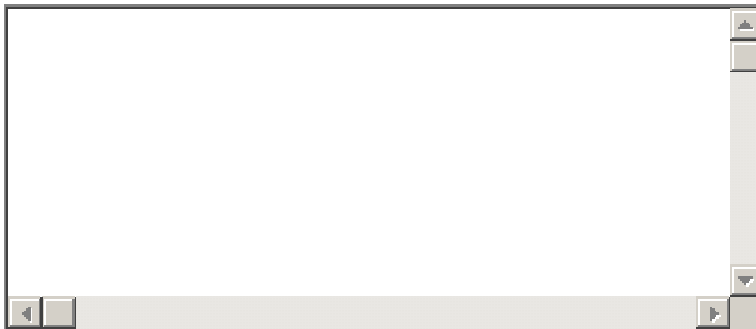
| No ▼ |

If "Yes", what type of Intangible benefits do you expect?

| Other ▼ |
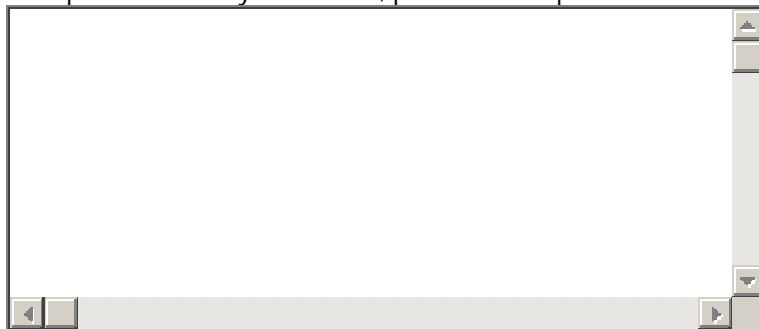
If "Service", select one:

| Re-engineer an existing service ▼ |
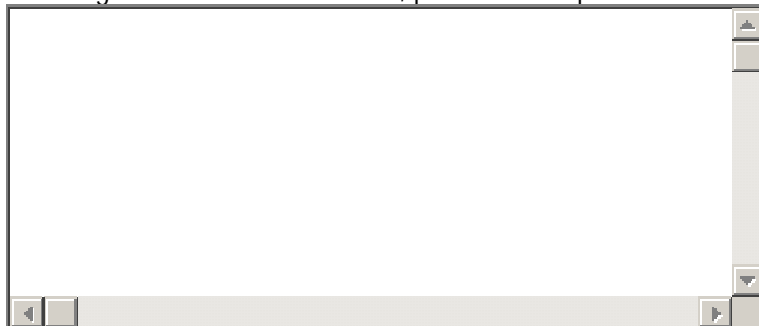
If "Improve Efficiency", check all that apply:

☐ Automating a Manual Process

☐ Expand Agency Collaboration

☐ Streamline work processes

☐ Other

If "Improve Efficiency" is "Other", provide description:

If "Intangible Benefits" are "Other", provide description:

19. Have you identified a technical approach for your project?

No ▼

If "Yes", describe the approach:

User Instructions for CATSPA Online Applications

Sign on Page

When signing on to the CATSPA system, a Web page will appear to determine and select which agency IT strategic plan is to be updated:
- 2004 – 2006 Budget Biennium
- 2006 – 2008 Budget Biennium

Selection of the appropriate budget biennium will route the user to the appropriate plan for updating.
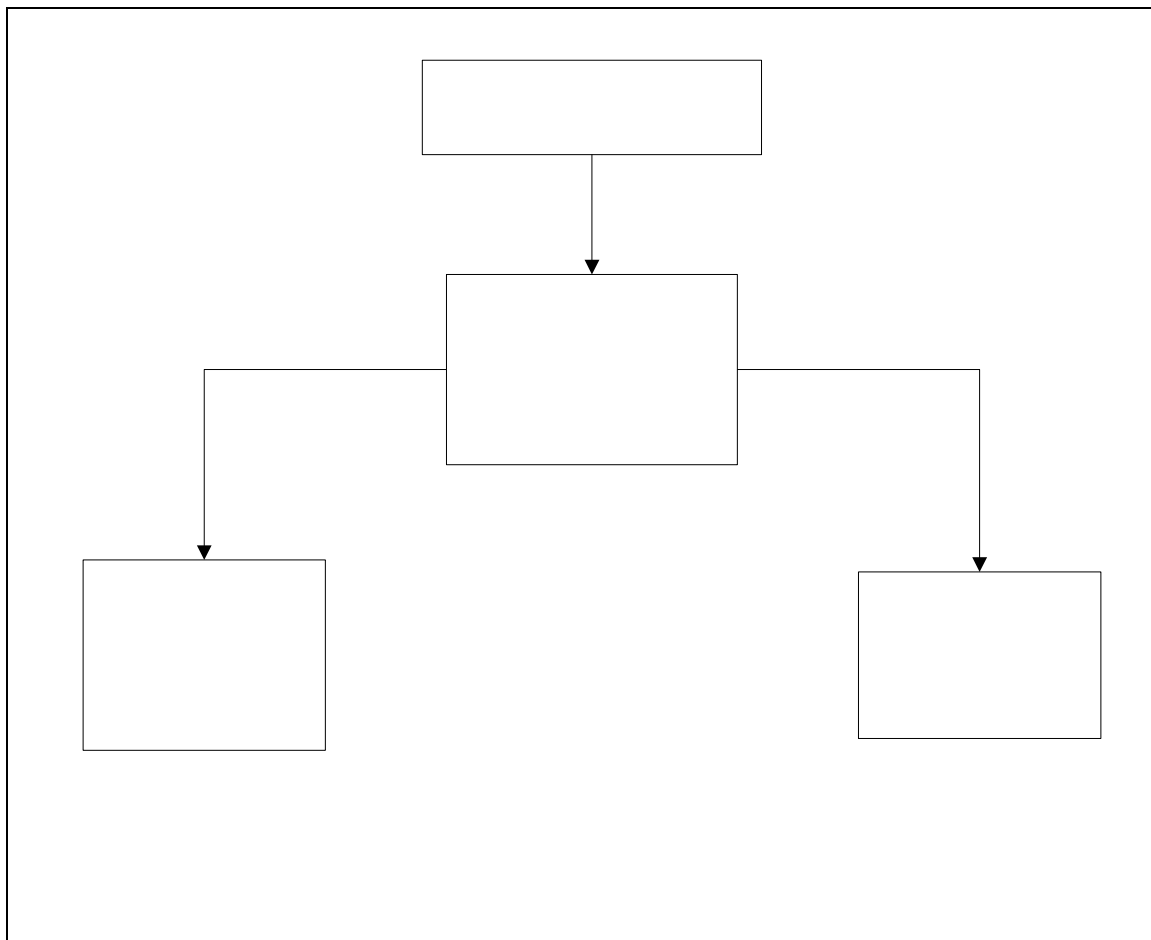
Projects and procurements that will be initiated in the coming fiscal year 2006 must be entered into the current Agency IT Strategic Plan for the 2004-2006 Budget Biennium.   If a

Sign on to CA
(Pegasus

project or procurement spans both budget biennium, it must be entered into both strategic plans. **Procurements that pertain to infrastructure needs are now the responsibility of VITA. This applies to procurements that support major and non-major projects as well as stand-alone procurements. The Enterprise Service Directors (ESD) and Service Level Directors (SLD) will be working with the agencies to collect this information for input into the VITA IT Strategic Plan.**

Step 1: Agency Major IT Projects and Supporting IT Procurements

Initial data required in the Agency IT Strategic Plan for Major IT Projects (i.e. projects costing more than $1 million, are mission critical, or have statewide application) and Supporting IT Procurements is described below.

Agencies should update their strategic plan via the ITSP amendment process to ensure that it reflects information submitted in their most current approved project proposals. To facilitate the approval process, please note in the "Amendment Justification" on the Amendment Form Page that these changes have been previously approved

- Project Name – Enter the name of the project.

- Short Project Description – Provide an initial, high-level statement describing the purpose, benefits, customer(s), general approach to development and characteristics of a product or service required by the organization.

- Planned Project Start Date – Enter the date when project planning activities are expected to begin. For continuing projects identify the actual project start date.

- Planned Project End Date – Enter the date when the project is expected to be closed out.

- Proposed or Continuing Project – Select the appropriate value to indicate whether the project is proposed or is a continuing project that will require funding during the planning period (2004-2006 Budget Biennium). All continuing projects, regardless of funding source, should be identified if project expenditures are expected during the planning period.

- Project Cost (Estimate at Completion) – Estimate the total cost to provide the business driven, technology-based product, or service. The costs include the hardware, software, services, installation, management, maintenance, support, training, and internal staffing costs planned for the project. Internal staffing costs are the apportioned salaries and benefits of the project team members. For continuing projects, the project total estimated costs should specify the remaining cost to complete the project.

- Total General Fund Project Costs – Enter the portion of Total Project Cost (Estimate at Completion) to be expended from general funds.

Additional expenditure information by Fiscal Year is being requested, in place of a project proposal, to facilitate the evaluation of the project when preparing the Recommended Technology Investment Projects (RTIP) report, which is submitted to the Governor and

General Assembly September 1, 2005. This information will also be reported in Appendix A of your Agency Strategic Plan.

- Estimated Costs (First Year of Biennium):

    o Estimated Project Expenditures First Year of Biennium (Total) – Enter the portion of Total Project Cost (Estimate at Completion) to be expended for the first fiscal year.

    o Funding Risk First Year of Biennium – Select the appropriate value to indicate whether the project funding risk level is low (i.e. allocated federal funds), medium (i.e. grant approved but not allocated), or high (i.e. unappropriated general funds).

    o Funding Source – Select the appropriate value to indicate whether the project funding source is General funds, Non-general funds (including grants), or Mixed (a combination of general and non-general funds).

    o Non-General Funding Source – The default value is "Not Applicable" which is appropriate if the project funding source is General Funds. Otherwise, select the appropriate value to indicate whether the non-general funding source is Federal, State or Other.

    o Estimated Project Expenditures First Year of Biennium (General Fund) – Enter the portion of Total Project Cost (Estimate at Completion) to be expended for the first fiscal year using general funds.

    o Estimated Project Expenditures First Year of Biennium (Nongeneral Fund) – Enter the portion of Total Project Cost (Estimate at Completion) to be expended for the first fiscal year using non-general funds. **This field is calculated for the Appendix A Report.**

- Funding Needed or Required (First Year of Biennium):

    o Funding Required for First Year of Biennium (Total) – Enter the portion of Total Project Cost (Estimate at Completion) to be expended for the first fiscal year. **This field is calculated for the Appendix A Report.**

    o Funding Required for First Year of Biennium (General Fund) – Enter the portion of Total Project Cost (Estimate at Completion) to be expended for the first fiscal year using general funds.

    o Funding Required for First Year of Biennium (Nongeneral Fund) – Enter the portion of Total Project Cost (Estimate at Completion) to be expended for the first fiscal year using non-general funds.

- Estimated Costs (Second Year of Biennium):

    o Estimated Project Expenditures Second Year of Biennium (Total) – Enter the portion of Total Project Cost (Estimate at Completion) for the second fiscal year.

- o Funding Risk Second Year of Biennium – Select the appropriate value to indicate whether the project funding risk level is low (i.e. allocated federal funds), medium (i.e. grant approved but not allocated), or high (i.e. unappropriated general funds).

- o Funding Source – Select the appropriate value to indicate whether the project funding source is General funds, Non-general funds (including grants), or Mixed (a combination of general and non-general funds).

- o Non-General Funding Source – The default value is "Not Applicable" which is appropriate if the project funding source is General Funds. Otherwise, select the appropriate value to indicate whether the non-general funding source is Federal, State or Other.

- o Estimated Project Expenditures Second Year of Biennium (General Fund) – Enter the portion of Total Project Cost (Estimate at Completion) to be expended for the second fiscal year using general funds.

- o Estimated Project Expenditures Second Year of Biennium (Nongeneral Fund) – Enter the portion of Total Project Cost (Estimate at Completion) to be expended for the second fiscal year using non-general funds. **This field is calculated for the Appendix A Report.**

- • Funding Needed or Required (Second Year of Biennium):

  - o Funding Required for Second Year of Biennium (Total) – Enter the portion of Total Project Cost (Estimate at Completion) for the second fiscal year. **This field is calculated for the Appendix A Report.**

  - o Funding Required for Second Year of Biennium (General Fund) – Enter the portion of Total Project Cost (Estimate at Completion) to be expended for the second fiscal year using general funds.

  - o Funding Required for Second Year of Biennium (Nongeneral Fund) – Enter the portion of Total Project Cost (Estimate at Completion) to be expended for the second fiscal year using non-general funds.

- • Service Areas Served by This Project:

  - o Select all service areas that benefit by this project and flag the one which is the project owner.

  - o For each service area, select all business objectives that are supported. This information will not be available for the July 15th submission. The update to add supporting business objectives will be due September 20th as an ITSP amendment.

  - o For each service area, select all customers served. This information will not be available for the July 15th submission. The update to add supporting business objectives will be due September 20th as an ITSP amendment.

- Preliminary Business Case Questions:

  - The following 'Preliminary Business Case' questions have been revised for the upcoming budget biennium. This information will be used to score and assign an initial 1 – n rank among all major IT projects. A project must receive a grade of 70 or above to be included in the 2005 Recommended Technology Investment Projects (RTIP) Report due to the Governor and General Assembly on September 1, 2005. Questions that are not answered will receive 0 points. The '2005 PMD Project Selection and Ranking Criteria for Major IT Projects' has been included in Appendix B for your review.   The IT Investment Board (ITIB) has shifted emphasis in the scoring and ranking process for the 2005 RTIP Report to 'Strategic Alignment' and 'Benefits to the Commonwealth' categories by weighting these categories more heavily than the other categories. A copy of these questions can be found in Appendix C.

Procurements Supporting the Project – List all planned procurements, equal to or greater than $50,000, expected to be executed in support of the project. If a procurement supports more than one project, identify the estimated procurement cost under one project, and list the procurement under the other project(s) with a zero cost.

- To add a related procurement, click [Add New Procurement] which is located under the project listing following the preliminary business case questions.

- In the edit window, provide the following information, using repeat entries, to identify each procurement supporting a Major IT Project.

  - Procurement Description – Provide a brief description of the goods or services to be procured.

  - Reason for the Procurement - State the reason this procurement is needed. (e.g., Renew Oracle Database License.)

  - Planned Procurement Delivery Date – Specify the date by which the purchased goods or services must be delivered.

  - Procurement Total Estimated Cost – Provide the total estimated cost of the goods or services being purchased.

- Click [Add New Procurement] to complete the entry. To update or remove a procurement, click [Edit] or [Delete].

- Associate Commonwealth Technology Initiatives or Enterprise Business Strategies – To associate Commonwealth Technology Initiatives or Enterprise Business Strategies with a project, click [Associate more Strategies and Initiatives] under the project listing, following Related Procurements. In the edit window, click on the check box next to each Initiative or Strategy associated with the project.   Click [Save] to complete the entry. Click [Remove] to delete an entry.

Step 2: Agency Major IT Procurements Not Supporting Major Projects

The following data is required for procurements with a total estimated cost exceeding $1 million, that are not associated with a project, and that will need to be procured during the planning period (e.g., license renewals).

> ➢ Procurement Description - Provide a brief description of the goods or services to be procured. A complete description will substitute for the related entry in the Agency Procurement Rrequest form.

> ➢ Reason for the Procurement - State the reason this procurement is needed. (e.g., Renew Oracle Database License.) A complete description will substitute for the related entry in the APR form.

> ➢ Planned Procurement Delivery Date - Specify the date by which the purchased goods or services must be delivered.

> ➢ Estimated Procurement Cost - Provide the total estimated cost of the goods or services being purchased.

Step 3: Agency Non-major IT Projects and Supporting IT Procurements

Initial data required in the Agency IT Strategic Plan for Non-major IT Projects and Supporting IT Procurements is described below. Non-major projects are projects with an estimated total project cost of at least $100,000 but not exceeding $1 million, and not deemed to be mission critical or designated as having statewide application.

- Project Name – Enter the name of the project.

- Short Project Description – Provide an initial, high-level statement describing the purpose, benefits, customer(s), general approach to development and characteristics of a product or service required by the organization.

- Planned Project Start Date – Enter the date when project planning activities are expected to begin. For continuing projects identify the actual project start date.

- Planned Project End Date – Enter the date when the project is expected to be closed out.

- Proposed or Continuing Project – Select the appropriate value to indicate whether the project is proposed or is a continuing project that will require funding during the planning period (2004-2006 Budget Biennium). All continuing projects, regardless of funding source, should be identified if project expenditures are expected during the planning period.

- Project Cost (Estimate at Completion) – Estimate the total cost to provide the business driven, technology-based product, or service. The costs include the hardware, software, services, installation, management, maintenance, support, training, and internal staffing costs planned for the project. Internal staffing costs are the apportioned salaries and benefits of the project team members. For continuing projects, the project total estimated costs should specify the remaining cost to complete the project.

- Total General Fund Project Costs – Enter the portion of Total Project Cost (Estimate at Completion) to be expended from general funds

Additional expenditure information by Fiscal Year is being requested, in place of a project proposal, for reporting in Appendix A of your Agency Strategic Plan.

- Estimated Costs (First Year of Biennium):

  o Estimated Project Expenditures First Year of Biennium (Total) – Enter the portion of Total Project Cost (Estimate at Completion) to be expended for the first fiscal year.

  o Funding Risk First Year of Biennium – Select the appropriate value to indicate whether the project funding risk level is low (i.e. allocated federal funds), medium (i.e. grant approved but not allocated), or high (i.e. unappropriated general funds).

  o Funding Source – Select the appropriate value to indicate whether the project funding source is General funds, Non-general funds (including grants), or Mixed (a combination of general and non-general funds).

  o Non-General Funding Source – The default value is "Not Applicable" which is appropriate if the project funding source is General Funds. Otherwise, select the appropriate value to indicate whether the non-general funding source is Federal, State or Other.

  o Estimated Project Expenditures First Year of Biennium (General Fund) – Enter the portion of Total Project Cost (Estimate at Completion) to be expended for the first fiscal year using general funds.

  o Estimated Project Expenditures First Year of Biennium (Nongeneral Fund) – Enter the portion of Total Project Cost (Estimate at Completion) to be expended for the first fiscal year using non-general funds. **This field is calculated for the Appendix A Report.**

- Funding Needed or Required (First Year of Biennium):

  o Funding Required for First Year of Biennium (Total) – Enter the portion of Total Project Cost (Estimate at Completion) to be expended for the first fiscal year. **This field is calculated for the Appendix A Report.**

  o Funding Required for First Year of Biennium (General Fund) – Enter the portion of Total Project Cost (Estimate at Completion) to be expended for the first fiscal year using general funds.

  o Funding Required for First Year of Biennium (Nongeneral Fund) – Enter the portion of Total Project Cost (Estimate at Completion) to be expended for the first fiscal year using non-general funds.

- Estimated Costs (Second Year of Biennium):

  o Estimated Project Expenditures Second Year of Biennium (Total) – Enter the portion of Total Project Cost (Estimate at Completion) for the second fiscal year.

  o Funding Risk Second Year of Biennium – Select the appropriate value to indicate whether the project funding risk level is low (i.e. allocated federal funds), medium (i.e. grant approved but not allocated), or high (i.e. unappropriated general funds).

  o Funding Source – Select the appropriate value to indicate whether the project funding source is General funds, Non-general funds (including grants), or Mixed (a combination of general and non-general funds).

  o Non-General Funding Source – The default value is "Not Applicable" which is appropriate if the project funding source is General Funds. Otherwise, select the appropriate value to indicate whether the non-general funding source is Federal, State or Other.

  o Estimated Project Expenditures Second Year of Biennium (General Fund) – Enter the portion of Total Project Cost (Estimate at Completion) to be expended for the second fiscal year using general funds.

  o Estimated Project Expenditures Second Year of Biennium (Nongeneral Fund) – Enter the portion of Total Project Cost (Estimate at Completion) to be expended for the second fiscal year using non-general funds. **This field is calculated for the Appendix A Report.**

- Funding Needed or Required (Second Year of Biennium):

  o Funding Required for Second Year of Biennium (Total) – Enter the portion of Total Project Cost (Estimate at Completion) for the second fiscal year. **This field is calculated for the Appendix A Report.**

  o Funding Required for Second Year of Biennium (General Fund) – Enter the portion of Total Project Cost (Estimate at Completion) to be expended for the second fiscal year using general funds.

  o Funding Required for Second Year of Biennium (Nongeneral Fund) – Enter the portion of Total Project Cost (Estimate at Completion) to be expended for the second fiscal year using non-general funds.

- Service Areas Served by This Project:

  o Select all service areas that benefit by this project and flag the one which is the project owner.

  o For each service area, select all business objectives that are supported. This information will not be available for the July 15th submission. The update to add supporting business objectives will be due September 20th as an ITSP amendment.

- For each service area, select all customers served. This information will not be available for the July 15th submission. The update to add supporting business objectives will be due September 20th as an ITSP amendment.

- Associate Commonwealth Technology Initiatives or Enterprise Business Strategies – To associate Commonwealth Technology Initiatives or Enterprise Business Strategies with a project, click [Associate more Strategies and Initiatives] under the project listing, following Related Procurements. In the edit window, click on the check box next to each Initiative or Strategy associated with the project. Click [Save] to complete the entry. Click [Remove] to delete an entry.

Procurements Supporting the Project – Include all planned procurements, equal to or greater than $50,000, expected to be executed in support of the project. If the procurement supports more than one project, identify the estimated procurement cost under one project, and list the procurement under the other project(s) with a zero cost.

- To add a related procurement, click [Add New Procurement].

- In the edit window, for each procurement supporting a Non-major IT Project, provide the following information:

  ➢ Procurement Description – Provide a brief description of the goods or services to be procured.

  ➢ Reason for the Procurement - State the reason this procurement is needed. (e.g., Renew Oracle Database License.)

  ➢ Planned Procurement Delivery Date – Specify the date by which the purchased goods or services must be delivered.

  ➢ Procurement Total Estimated Cost – Provide the total estimated cost of the goods or services being purchased.

- Click [Add New Procurement] to complete the entry. To update or remove a procurement, click [Edit] or [Delete].

Step 4: Agency Non-major IT Procurements Not Supporting Projects

Identify all procurements with expected cost of more than $50,000 but not exceeding $1 million that are expected to be executed during the planning period.

- Procurement Description – Provide a brief description of the goods or services to be procured. A complete description will substitute for the related entry in the APR form.

- Reason for the Procurement – State the reason this procurement is needed. (e.g., Renew Oracle Database License.) A complete description will substitute for the related entry in the APR form.

- Planned Procurement Delivery Date – Specify the date by which the purchased goods or services must be delivered.

- Estimated Procurement Cost – Provide the total estimated cost of the goods or services being purchased.

Certification

- On June 15th, all agency heads are required to certify that the data entered for major IT projects is correct. Go to the top of the Home page and click [Certification]. To certify that the information is correct, click [Certify Major IT Project Information].

- On July 15th, all agency heads are required to certify the data entered for the Agency IT Strategic Planning component. Go to the top of the Home page and click [Certification]. To certify that this information is correct, click [Certify Agency IT Strategic Plan]. which is at the top of the Web page.